

Dealer Contact List

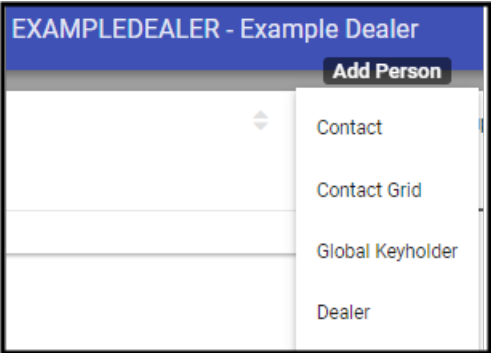
The **Dealer Contact List** contains all persons and entities that may be contacted for this Dealer. Any contacts created on the Dealer are available for contacting on any of the Dealer's accounts.

Contacts Card

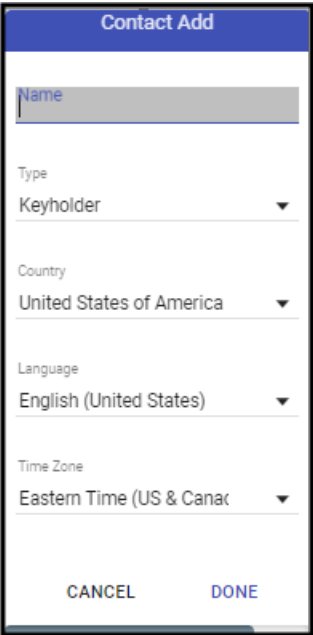
The contacts card is where you add the individuals who respond to or manage the dealer data.

Adding a Contact

Click the Plus sign (+) and select the type of contact to Add.



Contact Add

A screenshot of a mobile application form titled 'Contact Add'. The form has a blue header bar with the title. Below the header, there is a text input field for 'Name'. Underneath, there are four dropdown menus: 'Type' with 'Keyholder' selected, 'Country' with 'United States of America' selected, 'Language' with 'English (United States)' selected, and 'Time Zone' with 'Eastern Time (US & Cana...' selected. At the bottom of the form, there are two buttons: 'CANCEL' and 'DONE'.

1. Enter the **Name** of the Contact - Be sure to enter First Name then Last Name as you would have someone read it.
2. Select the **Type** - Keyholder is the default. Keep it as a Keyholder unless specified by your organization. *Dealers*

may need to change this user to **Technician** to enable other external features.

3. Verify the **Country, Language, and Time Zone**.
4. Click **Done**
5. This launches the **Advanced Edit**.

Contact Edit - Joe Contact

PROFILE CONTACT POINTS NAME & ADDRESS USER DEFINED FIELDS

Access

- Permissions Suspended
- Can Open/Close Within Schedule
- Can Open/Close Within Temp Open Window
- Can Open/Close Anytime
- Can Cancel Alarm
- Can Authorize a Schedule Change
- Can Put Entire Customer On Test
- Can Put Designated System/Areas On Test
- Can Edit Customer
- Can Give Out Customer Information

Credentials

Show All

Password: JOECONTACT

OpenVoice ID

Web Access ID

Web Profile: None

Notes

Question Answer

Availability

Valid From Valid To

CANCEL NEXT DONE

Enter any applicable data such as:

- o **Contact Password**
- o **Permissions** automatically load based on the data entered. You may update or change these at any time.
- o **Web Access ID**
- o **Notes**
- o **Availability**

6. Click **Next** to enter the **Contact Points** (Phone number, email address, etc.).

Contact Add - Joe Contact

PROFILE CONTACT POINTS NAME & ADDRESS WEB MEMBERSHIP USER DEFINED FIELDS

Phone Numbers

Type	Phone Number	Extension	Script	Schedule	Private
Mobile	(123) 156-1651		Script	No Schedule	<input type="checkbox"/>

ADD

Email Address

ADD

Web

ADD

CANCEL PREVIOUS NEXT DONE

7. Click **Next** to add the contact's **Name and Address**, if required.
8. Click **Next** to select or enter data into any contact-specific **User-defined** fields.
9. When all is entered as desired, click **Done**.
10. **Repeat** as required for all contacts, or use the **Contact Grid**.

Contact Grid

If you have multiple contacts to enter, Select **Contact Grid**.

1. Click **Add**

1. If available, it is possible to **import** a, properly formatted listing of contacts, using the handshake icon



2. Copy and paste the values in the prescribed format.

3. Click **OK**.
4. Make any updates or changes.

Type	Name	Site		
Technic	Joe Contact		+	x
Keyhold	John Smith		+	x
Keyhold	Sally Johnson		+	x
Technic	Nancy Benson		+	x
ADD				
				CANCEL
				DONE

5. Click **Done**.
2. If manually adding contacts to the list:
 1. Select the **Type**, if other than Keyholder
 2. Enter the **Name** of the first contact.
 3. Select the **Contact Point Type** in the header and then enter the number. If the person(s) have multiple numbers, click the **plus sign** (+) to add more column contact type headers.
 4. Click **Add** and repeat for all contacts
3. You may click the **Advanced Edit** to enter all contact details, as noted **above**.
4. When all are entered as needed, click **Done**.

Please note: Contacts are ordered based on the order entered into the system. To change the order of who is listed, please drag and rearrange.

Global Keyholder

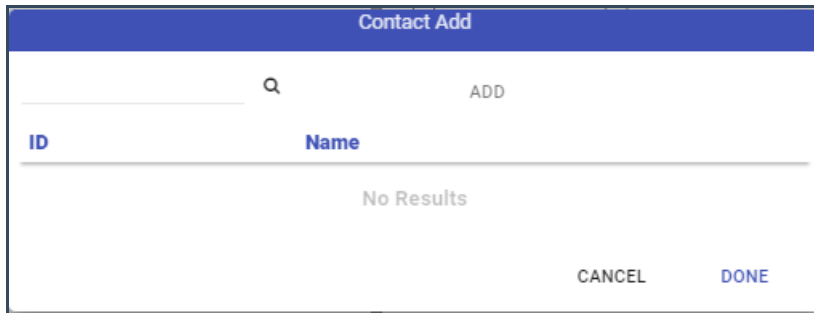
Global Keyholders are persons who are utilized on multiple accounts and reference a single Global Keyholder record for their details.

ID	Name
No Results	

1. Within the Add **Global Keyholder** dialog, enter or **search for the Global Keyholder** you wish to add.
2. Once loaded Click **Add**.
3. Once Added Click **Done**.
4. **Repeat** as required for all applicable Global Keyholders.

Dealer

You may add other Dealers that have a relationship with this Dealer as well.



Contact Add	
<input type="text"/>	ADD
ID	Name
No Results	
CANCEL DONE	

1. Select Dealer
2. Within the Dealer Add dialog enter or search for the Dealer to Add.
3. Once loaded click Add.
4. Once Added Click Done.
5. Repeat as required for all Dealers to link to this dealer.

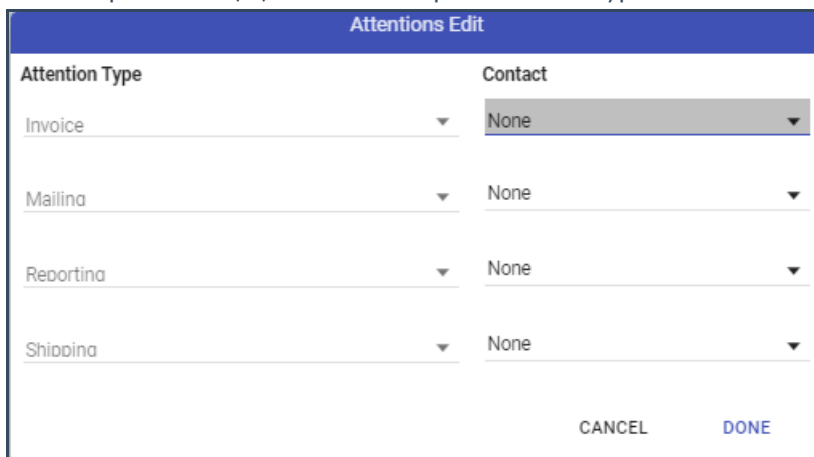
Once all contacts are entered as desired, Save (⌘) the record.

Attention Card

The Attention card is used only when printed items require attention to a specific person.

Adding an Attention

Click the pencil icon (✎) and select the person for the type of attention.



Attentions Edit	
Attention Type	Contact
Invoice	None
Mailing	None
Reporting	None
Shipping	None
CANCEL DONE	

When entered as desired, click Done.

Remember to click Save (⌘) to commit the information to the database.

Contact Details Card

The Contact Details card populates with the data entered for that contact upon selection of their contact within the Contacts Card.

You may click the pencil icon (✎) to edit the contact at any time. This launches the Advanced Edit dialog for that contact as above.
